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EXAMINER
PARKER, BRANDI P

ART UNIT	PAPER NUMBER
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Please find below and/or attached an Office communication concerning this application or proceeding.

The time period for reply, if any, is set in the attached communication.

Period for Reply

A SHORTENED STATUTORY PERIOD FOR REPLY IS SET TO EXPIRE <u>3</u> MONTH(S) OR THIRTY (30) DAYS,
WHICHEVER IS LONGER, FROM THE MAILING DATE OF THIS COMMUNICATION.
- Extensions of time may be available under the provisions of 37 CFR 1.136(a). In no event, however, may a reply be timely filed
  after SIX (6) MONTHS from the mailing date of this communication.
- If NO period for reply is specified above, the maximum statutory period will apply and will expire SIX (6) MONTHS from the mailing date of this communication.
- Failure to reply within the set or extended period for reply will, by statute, cause the application to become ABANDONED (35 U.S.C. § 133).
  Any reply received by the Office later than three months after the mailing date of this communication, even if timely filed, may reduce any
  earned patent term adjustment. See 37 CFR 1.704(b).

Status

1)☒ Responsive to communication(s) filed on <u>29 December 2009</u>.

2a)☒ This action is **FINAL**.   2b)☐ This action is non-final.

3)☐ Since this application is in condition for allowance except for formal matters, prosecution as to the merits is
closed in accordance with the practice under *Ex parte Quayle*, 1935 C.D. 11, 453 O.G. 213.

Disposition of Claims

4)☒ Claim(s) <u>1,2 and 4-14</u> is/are pending in the application.

    4a) Of the above claim(s) _____ is/are withdrawn from consideration.

5)☐ Claim(s) _____ is/are allowed.

6)☒ Claim(s) <u>1-2 and 4-14</u> is/are rejected.

7)☐ Claim(s) _____ is/are objected to.

8)☐ Claim(s) _____ are subject to restriction and/or election requirement.

Application Papers

9)☐ The specification is objected to by the Examiner.

10)☐ The drawing(s) filed on _____ is/are: a)☐ accepted or b)☐ objected to by the Examiner.

    Applicant may not request that any objection to the drawing(s) be held in abeyance. See 37 CFR 1.85(a).

    Replacement drawing sheet(s) including the correction is required if the drawing(s) is objected to. See 37 CFR 1.121(d).

11)☐ The oath or declaration is objected to by the Examiner. Note the attached Office Action or form PTO-152.

Priority under 35 U.S.C. § 119

12)☐ Acknowledgment is made of a claim for foreign priority under 35 U.S.C. § 119(a)-(d) or (f).

    a)☐ All   b)☐ Some * c)☐ None of:

      1.☐ Certified copies of the priority documents have been received.

      2.☐ Certified copies of the priority documents have been received in Application No. _____.

      3.☐ Copies of the certified copies of the priority documents have been received in this National Stage
application from the International Bureau (PCT Rule 17.2(a)).

    * See the attached detailed Office action for a list of the certified copies not received.

Attachment(s)

1)☒ Notice of References Cited (PTO-892)

2)☐ Notice of Draftsperson's Patent Drawing Review (PTO-948)

3)☐ Information Disclosure Statement(s) (PTO/SB/08)
Paper No(s)/Mail Date _____.

4)☐ Interview Summary (PTO-413)
Paper No(s)/Mail Date _____.

5)☐ Notice of Informal Patent Application

6)☐ Other: _____.

DETAILED ACTION

Acknowledgements

1.   The following is a Final Office action in response to communications filed on 12/9/2009. Claims 1-2 and 4-14 are pending. Claims 1-2, 4-5 and 7-14 have been amended. Claim 3 has been previously cancelled.

Response to Amendments

2.   Applicant's amendment to claim(s) 1 and 8, filed on 12/29/2009, has been fully considered and is persuasive. The rejection of claims 1-14 under 35 USC § 101 has been withdrawn.

Response to Arguments

3.   In response to Applicant's argument that Cook, Johnson and the noted statement about Microsoft Excel fail to disclose or suggest first or second user interfaces, which is located on page 9 of Applicant's Remarks, Examiner respectfully disagrees. Cook teaches a web-based system for managing customer lead data using a cryptographically secure web-interface (paragraph 0002). Furthermore, the computer system such as the system provided in Cook (paragraph 0013, web-based lead

management forms) and a database management system provided in Microsoft Excel

have the capability to have multiple interfaces or input screens. Therefore, Cook,

Johnson and the noted statement about Microsoft Excel disclose or suggest first or

second user interfaces to teach and suggest this limitation.

Claim Rejections - 35 USC § 103

4.   The following is a quotation of 35 U.S.C. 103(a) which forms the basis for all

obviousness rejections set forth in this Office action:

> (a) A patent may not be obtained though the invention is not identically disclosed or described as set
> forth in section 102 of this title, if the differences between the subject matter sought to be patented and
> the prior art are such that the subject matter as a whole would have been obvious at the time the
> invention was made to a person having ordinary skill in the art to which said subject matter pertains.
> Patentability shall not be negatived by the manner in which the invention was made.

5.   Claims 1-14 rejected under 35 U.S.C. 103(a) as being unpatentable over Cook

(US 2002/0059095) in view of Johnson et al (US 6067525).

6.   With respect to claim 1, 8 and 10, Cook teaches:

        a.   receiving, at one or more computer systems hosting a network-based

        sales territory planning an targeting tool, information regarding needs of

        customers of a salesperson within a sales territory (paragraph 0002, 0005, and

        0012, regarding customer lead data, including customer needs);

b.   receiving, at the one or more computer systems hosting the network-based sales planning and targeting tool, information regarding an install base of products and/or services of the customers, the install base information including origination information indicating those products and/or services that originate from an employer of the salesperson (paragraph 0011, regarding "e-brochure" containing information relating to the products or services that the company is promoting; paragraph 0045, regarding customer representative logs on to the Lead Management Intranet using passwords assigned by sales territory);

c.   generating, with one or more processors associated with the one or more computer systems hosting the network-based sales territory planning and targeting tool, information based on the customers' needs and install base information, tagging as sales opportunities those products and/or services offered for sale by the salesperson that match the customers' needs and those products and/or services of the customers' install base of products and/or services offered by the sales representative that the customers are likely to consider purchasing (paragraph 0006, regarding matching the customer's product/service need requirements to the products and services that the company provides);

d.   storing the customers' needs information, the customers' install base information, and the tagging information in a central database associated with the one or more computer systems hosting the network-based sales territory

planning and targeting tool; (paragraph 0012, regarding presenting to the customer lead an optimized solution to their problems by listing a range of potential product/service solutions),

e.   generating, with the one or more processors associated with the one or more computer systems hosting the network-based sales territory planning and targeting tool, information configured for displaying a first user interface on a computer coupled to a network, the first user interface having visual elements that enable the salesperson to formulate a search of the central database according to selected ones of a plurality of parameters related to customers in the salesperson's sales network and the products and/or services offered for sale by the salesperson (paragraph 002, regarding the cryptographically secure web-interface; paragraph 0013, regarding searching the lead management database for customer information);

f.   receiving, at the one or more computer systems hosting the network-based sales territory planning and targeting tool, results of applying the search to the central database; and   (paragraph 0013, regarding searching the lead management database for customer information);

g.   generating in response to receiving the results of the search, with the one or more processors associated with the one or more computer systems hosting

the network-based sales territory planning and targeting tool, information configured for displaying a second user interface on a computer coupled to the network, the second user interface configured according to the search with a tabular worksheet organized across the customers in the salesperson's sales territory and the products and/or services offered for sale by the salesperson, entries in the tabular worksheet including at least the tagged sales opportunities, the customers' install base of products and/or services, the origination information, and unknown information that identifies where the salesperson should gather additional install base information (paragraph 0045, regarding generated reports and tabulated information regarding product/service features).

Cook does not teach including in the base of information regarding the offered products and services those products and/or services that originate from competitors of the salesperson's employer. However, Johnson teaches presenting the company's product information side-by-side with a competitor's product information (column/line 12/43-46). It would have been obvious to one of ordinary skill in the art to include the business methods of Cook with the ability to view competitor product/service information as taught by Johnson since the claimed invention is merely a combination of old elements, and in the combination each element merely would have performed the same function as it did separately, and one of ordinary skill in the art would have recognized that the results of the combination were predictable.

7.   Regarding claims 2, 7, 9 and 14, Cook, in view of Johnson teaches the system of

claim1 and providing the stored information in a tabular worksheet worksheet

(paragraph 0045, regarding generated reports and tabulated information regarding

product/service features). Cook in view of Johnson does not directly teach visually

coding the tabular worksheet or customizing the appearance and ordering of entries in

the worksheet, and limiting the results on information stored in the database. However,

it is old and well known in the art to use spreadsheet applications, such as Microsoft

Excel, to color-code and customize worksheets. Also, it is old and well known in the art

to use a spreadsheet application such as Microsoft Excel to filter results in the

spreadsheet based on a selected parameter. Therefore, it would have been obvious to

one with ordinary skill in the art to include such features in the aforementioned claims in

Cook to render the claims obvious, since the claimed invention is merely a combination

of old elements, and in the combination each element merely would have performed the

same function as it did separately, and one of ordinary skill in the art would have

recognized that the results of the combination were predictable.

8.   In the previous Office Action mailed 8/5/2008 and 2/3/2009, notice was taken by

the Examiner that the above subject matter is old and well known in the art. Per MPEP

2144.03(c), these statements are taken as admitted prior art because no traversal of

this statement was made in the subsequent response.

9.   With respect to claims 4 and 11, Cook teaches the computer-implemented method of claim 1, further comprising: receiving, at the one or more computer systems hosting the network-based sales territory planning and targeting tool, information specifying a sales hierarchy of the salesperson's employer, each role in the sales hierarchy having a set of predetermined rights and responsibilities; and wherein information stored on the central database is selectively accessible via the visual elements of the first user interface according to a role of the salesperson defined in the sales hierarchy of the salesperson's employer (paragraph 0045, regarding access to the lead management intranet can be according to the levels of authority).

10.   Regarding claims 5 and 12. Cook further teaches receiving, at the one or more computer systems hosting the network-based sales territory planning and targeting tool, information provided by the salesperson's manager defining the tabular worksheet for the salesperson; and wherein generating the information configured for displaying the second user interface comprises generating the information configured for displaying the second user interface based on the information provided by the salesperson's manager defining the tabular worksheet for the salesperson the provided information in the tabular worksheet in the providing step is limited to results of a search on the information stored in the database (paragraph 0045, regarding generated reports and tabulated information regarding product/service features).

11.   Regarding claims 6 and 13, Cook further teaches wherein the search is carried

out for at least one parameter selected from customer, region, industry, product,

service, origination information and unknown information (paragraph 0045, regarding

generated reports and tabulated information regarding product/service features).

Conclusion

12.   **THIS ACTION IS MADE FINAL.** Applicant is reminded of the extension of time

policy as set forth in 37 CFR 1.136(a).

13.   A shortened statutory period for reply to this final action is set to expire THREE

MONTHS from the mailing date of this action. In the event a first reply is filed within

TWO MONTHS of the mailing date of this final action and the advisory action is not

mailed until after the end of the THREE-MONTH shortened statutory period, then the

shortened statutory period will expire on the date the advisory action is mailed, and any

extension fee pursuant to 37 CFR 1.136(a) will be calculated from the mailing date of

the advisory action. In no event, however, will the statutory period for reply expire later

than SIX MONTHS from the mailing date of this final action.

14.   Any inquiry concerning this communication or earlier communications from the

examiner should be directed to BRANDI P. PARKER whose telephone number is (571)

272-9796. The examiner can normally be reached on Mon-Thurs. 8-5pm.

15.   If attempts to reach the examiner by telephone are unsuccessful, the examiner's supervisor, Kambiz Abdi can be reached on (571) 272-6702. The fax phone number for the organization where this application or proceeding is assigned is 571-273-8300.

16.   Information regarding the status of an application may be obtained from the Patent Application Information Retrieval (PAIR) system. Status information for published applications may be obtained from either Private PAIR or Public PAIR. Status information for unpublished applications is available through Private PAIR only. For more information about the PAIR system, see http://pair-direct.uspto.gov. Should you have questions on access to the Private PAIR system, contact the Electronic Business Center (EBC) at 866-217-9197 (toll-free). If you would like assistance from a USPTO Customer Service Representative or access to the automated information system, call 800-786-9199 (IN USA OR CANADA) or 571-272-1000.

/BRANDI P PARKER/
Examiner, Art Unit 3624

/Romain Jeanty/
Primary Examiner, Art Unit 3624
March 28, 2010